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| sAKHISISIZWE |
| **Workplace Log book and Guide** |
| For mentor and learner |
| \*ACTIVITIES FROM FORMATIVE AND SUMMATIVES MAY BE REPEATED AND COPIES CAN BE INSERTED |
| **Management level 4** |
| **57712** |

**SAKHISISIZWE GUIDE TO WORKPLACE LEARNING AND MONITERING**

## Introduction to integrate learning and assessment into the workplace

###### 1. Overview

* 1. **Purpose**

The purpose of this document is to:

* Provide a structured approach on how to integrate learning and assessment into the workplace.
* Suggest ways of managing the integration of learning and assessment in the workplace through effective coaching and mentoring.
* Provide a template which can be used to implement, monitor and evaluate workplace learning and assessment.

**1.2 Outcomes Critical:**

The purpose of this Criteria & Guideline document is to provide an overview of the principles, methods and process of integrating provision and assessment of skills programmes, learnerships and qualifications in the workplace.

The **practical** outcomes of this document:

* Integrate learning and assessment in the workplace, using a structured approach.
* Manage the integration of learning and assessment in the workplace.
* Coach and mentor employees through the process of workplace learning and assessment.

The **knowledge** outcomes of this document:

* Understand the structured process for integrating learning and assessment in the workplace.
* How to identify performance and assessment outcomes
* How to sequence workplace experience and assessment
* Explain the importance of the role of coach/ mentoring and assessor in the success of learning and assessment in the workplace.
* Understand the relationship between formal learning, workplace learning and assessment.

###### Introduction

**30 %** of learning takes place in the classroom. The other **70%** of learning takes place in the workplace in the form of structured workplace experience and assessment. ETD practitioners pay considerable attention to what happens for 30% of learning time, yet what happens for 70% of learning time is left largely to chance and relies on the commitment of stakeholders in the workplace to manage.

**Tip:** Skill alone is not enough to guarantee performance.

Successful job performance requires; skills, opportunity to perform,

Self-confidence and a supportive environment. AND

You can’t store learning.

***“Use it or lose it”.***

***Scope of this Guide:***

This guide sets out to provide a structured approach that practitioners can use to manage the integration of learning and assessment in the workplace.

**Critical:**

Integration of learning and assessment in the workplace requires the learner to use the competence gained during formal learning (safe environment) and implement it in the workplace (unpredictable environment).

So, learning that takes place in the workplace is a **continuance of the process** initiated in the classroom. All stakeholders involved in workplace learning and assessment must understand that the outcomes-based approach to learning is about continuous and lifelong learning and that both formal and workplace learning is **aimed at achieving the same end result/outcome.**

###### 3. The Relationship Between Learning, Experience & Assessment.

There is a distinct relationship between learning, workplace experience and assessment. Learning is a process; workplace experience is a process and assessment is a process. And the 3 processes are linked one to the other.

**INTERVENTIONS ALIGNED WITH UNIT STANDARD/S AND/OR QUALFICATIONS:**

* Unit standard based learning programmes and courses,
* Skills programmes,
* Learnerships and
* Qualifications.

**ALL REQUIRE A COMBINATION OF …**

**Formal/Informal Learning,**

*WHICH IS…*

The process of **gaining** knowledge and skills that isaligned with specificrequirements contained in a unitstandard/s.

(Competence gained in a safeenvironment)

**Workplace Experience/Practice, and**

*WHICH IS…*

The process of implementing/transferring knowledge and skills to the workplace that are aligned with organization specific requirements.

(Skills performed/practiced in an unpredictable and authentic work context)

**Assessment**

The process in which evidence is gathered and evaluated against agreed criteria in order to make a judgement of competence for developmental and/or recognition purposes.

(Competence/performance proved in the workplace)

**Tip:**

**Learnerships** which result in a qualification, in particular require a structured, formal and documented approach to the integration of learning and assessment in the workplace.

###### 4. Who Is Responsible For Workplace Integration & Assessment?

There are a number of individuals who are responsible for workplace integration and assessment.

The roles and responsibilities differ across organisations, depending on the size or structure of the organisation.

Any combination of the following individuals can be responsible for workplace integration and assessment:

###### ROLE DEFINITION & RESPONSBILITIES

|  |  |
| --- | --- |
| **Role** | **Definition & Responsibilities** |
| Facilitator | A person who provides support, guidance and resources to learners, in an environment that is conducive to learning, using a planned sequence of  activities that **enable the learner to achieve learning outcomes.** |
| Supervisor/ Manager | A person who provides clear and concise guidelines on what job specific  outcomes and deliverables are required for performance on the job. |
| Evidence Collection  Facilitator | A person who works within particular contexts, under the supervision of  registered assessors, to help candidates/learners **gather, produce and organise evidence for assessment.** |
| Assessor | A person who is registered by the relevant ETQA in accordance with criteria established for this purpose by a SGB to **measure the achievement of**  **specified NQF standards or qualifications.** |
| Coach | A person who provides guidance and support to individuals, in the  workplace, on how to actively **develop competence and implement**  **practical skills necessary for workplace performance.** |
| Mentor | A person who provides expert advice and guidance **to oversee the career**  **and development** of another person, through teaching, coaching,  counselling, providing psychological support and at times promoting or  sponsoring. |
| Learner | A person who participates in a learning programme with the purpose of achieving credits for standards and/or qualification. |

**Critical:**

Following is a suggested process which will ensure a structured approach:

###### 5.1 INTEGRATE LEARNING THROUGH COACHING INTEGRATE ASSESSMENT

**Prepare for coaching:**

* Identify performance outcomes
* Sequence the workplace experiences
* Prepare the environment

**Coach learner/s:**

* Create rapport
* Demonstrate the task
* Provide practice opportunities for the learner
* Support the learner
* Identify opportunities for integrating assessment in the workplace
* Facilitate the collection of evidence for assessment
* Assess the candidate
* Document the evidence

###### EVALUATE THE WORKPLACE INTEGRATION PROCESS

* Judge the value of workplace integration of learning and assessment.

**WORKPLACE INTEGRATION PROCESS**

**Integrate Learning through Coaching**

The first phase of workplace integration is that of integrating learning through coaching in the workplace.

The process is as follows:

###### PREPARE FOR COACHING:

**STEP 1:** Identify performance outcomes

**STEP 2:** Sequence the workplace experiences

**STEP 3:** Prepare the environment for coaching

###### COACH LEARNERS:

**STEP 4:** Create rapport

**STEP 5:** Demonstrate the task

**STEP 6:** Provide practice opportunities for the learner

**STEP 7:** Support the learner

**5.1.1 Prepare for Coaching**

###### STEP 1: Identify Performance Outcomes

The first step in preparing for coaching is to identify performance outcomes.

* Outcomes necessary to achieve the end result of learning/unit standard have already been analyzed and identified,
* These outcomes have been learnt and practiced in a safe learning environment.

What remains is to identify performance outcomes necessary for the integration of learning into the workplace.

If an outcomes-based approach to learning has been applied, then there should be very little difference between learning and performance outcomes. However, performance outcomes focus specifically on how the learner **applies** the knowledge gained with reflective and critical thinking.

To identify performance outcomes, refer to your unit standard analysis where unit standard outcomes have been analyzed and interpreted into learning outcomes.

Capture the performance outcomes in the Workplace Guide.

###### STEP 2: Sequence Workplace Practice/Experiences

Once the performance outcomes have been identified and noted, the related activities for workplace practice can be sequenced.

The sequence of activities should correlate with the sequence of outcomes analysed in the unit standard analysis phase.

*An example of an excerpt from a Workplace Guide:*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Skills Programme Name** | | ***Unit Standard*** | | ***Notional Hours*** | |
| Maintain hygiene in food production areas | | FP01 (7639) Maintain hygiene in food preparation, cooking and storage areas | | **Total = 50 hrs**  Theory & Practice = 21 hrs  Workplace = 24 hrs  Assessment = 5 hrs | |
| **Outcome** | **Practice** | | **Resources** | | **Duration** |
| 1. Take delivery of food items | a) Identify a range of food types and items  b) Check the quality of the food items received  c) Apply the hygiene principle to the food items received  d) Identify the consequences of not checking the quality and condition of food items | | ● Range of food items (ambient, chilled, frozen)  ● Range of storage facilities (freezer, cold room, pantry)  ●Standard operating procedure checklist | | 1 hour |
| 2. Store food items | a) Make a decision about where to store food items  b) Make a decision about how to store  food items  c) Store food items according to  hygiene standards  d) Identify and solve problems related  to storing food items hygienically | | ● Range of food items  (ambient, chilled, frozen)  ● Range of storage  facilities (freezer, cold  room, pantry)  ●Standard operating  procedure checklist | | 2 hours |

Get agreement from the learner on the outcomes that need to be practiced and also arrange mutually convenient times for the practice sessions to happen.

###### Forms & Templates:

Note the practice session times and outcomes in the appropriate place in the Workplace Guide.

###### STEP 3: Prepare the Environment

There are a few considerations in preparing the work environment for the practice opportunities to take place.

Experienced coaches understand the importance of maximising the learning of adults by creating a positive environment by considering two aspects:

**The physical environment:**

The physical environment refers to the tangible workplace environment. The physical aspects of the environment in which the coaching is conducted is vital to the degree to which the learner feels safe, secure and comfortable.

## QUALIFICATION/LEARNERSHIP RESOURCES

To identify specific resources required (for example a learnership/ qualification in guiding or cookery), refer to:

* the requirements in the qualification, and
* source the Unit Standard Analysis document,
* the programme strategy and/or
* the curriculum designed,

…either in-house or from the provider (if the learnership provision is outsourced).

From these documents identify what workplace experiences and resources (media, products, aids, equipment, workplace set up) are required.

***Then*** ascertain what is actually available in the workplace.

If the required resources are not available then make a decision on how you will adapt the situation to cater for the gaps and still ensure that ***practice and competence is gained***.

###### The physical environment may also include aspects such as:

* **Noise levels (outside of normal noise)** – can the learner comfortable hear and concentrate,
* **Room temperature** – is the room temperature comfortable or is it too hot or too cold?
* **Comfort levels** – consider the comfort level of the chair, desk, equipment being used, etc
* **Lighting** – is their sufficient lighting for the learner to be able to see and make notes?
* **Breaks** – consider the learner’s need for breaks e.g. meals, drinks, comfort breaks etc.
* **Resources** – does the coach and the learner have access to the relevant resources, learning aids and equipment needed to perform the task? (These should be noted in the Workplace Guide)

###### The psychological environment:

The psychological environment refers to the mental workplace environment. The psychological aspects of the environment in which the coaching is conducted is vital to the degree to which the learner feels safe, secure and comfortable.

This includes aspects such as:

* Learners’ personal concerns regarding the learning e.g. their ability to learn, fear of embarrassment or failure
* Learners’ approach to learning. Their unique background and set of experiences that influences their approach to learning
* Learners’ varying communication skills and language abilities.

**B. COACH LEARNERS:**

**STEP 4:** Create rapport

**STEP 5:** Demonstrate the task

**STEP 6:** Provide practice opportunities for the learner

**STEP 7:** Support the learner

###### :

|  |
| --- |
| **A. PREPARE FOR COACHING:**  **STEP 1:** Identify performance outcomes  **STEP 2:** Sequence the workplace experiences  **STEP 3:** Prepare the environment for coaching |

**5.1.2 Coach Learner/s**

###### STEP 4: Create Rapport

The first step in coaching learners is to create rapport with the learner.

Creating rapport involves communication. If we break down communication into its elements it looks like this:

* 7% of the communication is derived from the verbal element or the words used
* 38% of the communication is derived from the voice element or the inflection/tone or pitch of our voices
* 55% of the communication is derived from the non-verbal element or the body language

**The greatest part of our message therefore is received from non-verbal clues or body language:**

* It could be in the way it is spoken, like the tone or volume of the voice.
* It could be in body language, facial gestures, posture or hand gestures.

**Tip:**During this step make sure that the learner is comfortable by using appropriate communication and body language.

###### STEP 5: Demonstrate the Task

**Explain the elements of the task to be performed:**

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1.** | Begin each session and each topic with a good introduction. This will serve to capture interest and create a positive coaching environment from the start. |
| **2.** | Cover any related technical theory, spelling out and explain all new terms or technical jargon that will be used. |
| **3.** | Explain the task to be performed, as well as the importance of the task in relation to the broader context. This will help the learner to understand why steps are presented in a specific sequence and why following that sequence is important. |
| **4.** | Explain to the learner what the required standards for the task are, by giving examples. |
| **5.** | Stress safety where applicable. |

**Demonstrate the task:**

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1.** | Explain the outcome of the task to be performed, as well as the importance of the task in relation to the broader context |
| **2.** | Demonstrate the task, clearly indicating the desired outcome/s and explain to the learner the required standards for the task. |
| **3.** | Explain the task using the sequencing and material identified. Emphasize important points with job-related examples, as well as through the use of questioning, practice activities or discussions. |
| **4.** | Ensure that the demonstration of the task complies with health and safety regulations. |
| **5.** | Demonstrate the task in stages and give clear directions for all activities so that the learner will not become confused or lose interest. Learners should not have to wonder what will come next or what they are supposed to do or how the activities will be conducted. |
| **6.** | Check for understanding through using open-ended questions. Open-ended questions are questions, which encourage two-way communication and allow for a broad response. Stay clear of closed questions, such as “Do you understand?” |
| **7.** | Give feedback. Adult learners like to know how their efforts measure up as compared to the objectives of the coaching session. We will discuss feedback in more detail later on in this module. |

###### STEP 6: Provide Practice Opportunities for the Learner

Once you have clearly explained the elements of the task to be performed and demonstrated the task, it is time to allow the learner the opportunity to practice.

**At this stage you need to:**

|  |  |
| --- | --- |
| **Step** | **Action** |
| **1.** | Ensure that the tasks you give to the learner are sequenced in a logical manner. |
| **2.** | Ensure tasks are appropriate to learner's needs. |
| **3.** | Explain the task to the learner in language that they understand. |
| **4.** | Check the learner's understanding of the task by watching them complete a task or a few tasks. |
| **5.** | Listen and observe to see what the learner is doing correctly and incorrectly. |
| **6.** | Ask questions to check their progress and understanding. |
| **7.** | Let the learner to practice the skill and ensure that the learner has mastered each stage before moving onto the next. |
| **9.** | Give constructive feedback – putting the emphasis on encouragement, not criticism. |
| **10.** | Modify task instructions according to the learner's needs. |
| **11.** | Provide additional information for the learner to reinforce key learning points. |
| **12.** | Advise learner of the availability of resources i.e. where they can get additional help or assistance. |

###### STEP 7: Support the Learner

Throughout this process it is the responsibility of the coach to provide the learner with support and advice. It is therefore important that the coach:

* Praise the learners, tell them what they are doing right.
* Gently correct the learner if they are going wrong and rephrase your original instructions.
* Remain patient, calm and encouraging.
* Avoid belittling or shaming the learners in any way.
* Keep threats, even implied ones out of your conversation and remarks.
* Support the learners’ efforts. Keep your remarks upbeat, point to both those things your learner has done right and to those things he did wrong.
* Look at mistakes as learning opportunities.
* Separate the behaviour from the learner.
* Recognise improvements.
* Build on strengths and assets.

###### 5.2 Integrate Assessment

This next phase of the process is to integrate assessment into the workplace.

The steps are as follows…

**A. PREPARE CANDIDATES FOR ASSESSMENT:**

**STEP 1:** Identify opportunities for integrating assessment in the workplace

**STEP 2:** Facilitate the collection of evidence for assessment

**B. ASSESS CANDIDATE:**

**STEP 3**: Assess the candidate

**STEP 4:** Document the evidence

* + 1. **Prepare Candidates for Assessment**

###### STEP 1: Identify Opportunities for Integrating Assessment in the Workplace

**Critical:** The *“Conduct Outcomes-Based Assessment”* (115753) unit standard requires that during assessment, *sufficient evidence is gathered* including evidence generate over time, to enable valid, consistent, reliable and fair assessment judgement to be made.

*Evidence is tangible proof* produced by or about individuals that can be perceived with the senses, bearing a direct relationship to defined outcomes and criteria, based on which *judgements are made* concerning the competence of individuals.

Conducting assessments in the workplace will produce assessment evidence that meet with the above criteria. Assessment therefore also forms an integral part of workplace integration.

The **Assessment Guide** that is developed specifically for the assessment of competence of individuals against specific unit standard/s will provide direct instructions on how and where assessment **evidence** must be gathered in the workplace.

###### STEP 2: Facilitate the Collection of Evidence for Assessment

Here again the Evidence Collection Facilitator will advise and support the assessment candidate on the evidence requirements for assessment.

###### GATHERING WORKPLACE EVIDENCE.

|  |  |
| --- | --- |
| **Evidence Collection**  **Facilitator’s Role** | Individuals who assist candidates to **prepare** and **present evidence** for assessment. They ensure that candidates are ready to present well organised and complete evidence to registered assessors. |
| **Assessor’s Role** | Individuals who **conduct assessments** to judge a candidate’s level of competence and achievement of learning outcomes. |
| **Moderator’s role in**  **workplace assessment** | Individuals who **evaluate** the **assessment** environment, process and instruments to confirm the reliability and authenticity of assessment results and improving the quality of assessments and assessors. |
| **Forms of Evidence** | Products, tasks completed, research/test driven assignments. |
| **Where/Who from?** | Evidence can be collected through peers, customers, workplace supervisors and assessors or evidence collection facilitators. |
| **Methods of collecting**  **evidence** | Observation, Document Reviews, Interviews etc. |
| **Tips on gathering**  **evidence for workplace assessment** | **Do not** focus on **how much** rather on **what** evidence is  required. (This will help to keep paper volumes down.)  • Try to collect “**naturally occurring evidence**” – evidence  that is already being produced in the workplace to avoid  unnecessary duplication and to keep assessment “real.”  • Use **peer and supervisor input** when gathering evidence.  They are the ones that work directly with the candidate and  can provide valuable testimonies about the candidate.  • The workplace supervisor/coach/moderator must ensure that **evidence is gathered as per Assessment Guide**. They must check that neither evidence nor the assessment  method deviates from the guide – as the guide and related  instruments are aligned with the unit standard requirements. |

###### 5.2.2 Assess the Candidate

**A. PREPARE CANDIDATES FOR**

**ASSESSMENT:**

**STEP 1:** Identify opportunities for integrating assessment in the Workplace

**STEP 2:** Facilitate the collection of evidence for assessment

**B. ASSESS CANDIDATE:**

**STEP 3**: Assess the candidate

**STEP 4:** Document the evidence

## Work Integrated Learning Monitoring Report

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employer** | | | |  | |
| **SAKHISISIZWE Representative** | | | |  | |
| **Date of Monitoring Visit** | | | |  | |
| **Number of Learners Enrolled** | | | |  | |
| **Numbers of Learners currently in the programme** | | | |  | |
| **Start Date of project** | | | |  | |
| **End Date of project** | | | |  | |
| **Name of Lead Employer** | | |  | | |
| **Name of Host Employer** | | |  | | |
| **Description of site** | | | | | |
| **On-Site** | **Physical Address** | |  | | |
| **Postal Address** | |  | | |
| **Office Number** | |  | | |
| **Details of Contact Person** | | | **Name:** | | |
| **Details of Contact Person** | | **Tel Number** | | |  |
| **Cell Phone** | | |  |
| **Email Address** | | |  |

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| Criterion A | | | | | | Compliance to the Skills Development Act | | | | | | | | | | | | | | | | | | | | | |
| **No.** | **Conforming Requirement** | | | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | |
| A1 | The Graduate/Intern works for the employer as part of the learning process  *Evidence: Time Sheets, Workplace attendance register/ records* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| A2 | There are records of relevant workplace experience  *Evidence: Clock cards, Workplace training records* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| A3 | There are records of relevant job evaluations  *Evidence: Evaluation reports, progress reports* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| A4 | There are up to date records of training  *Evidence: Workplace training records* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| A5 | The Employer provides supervision of the Graduate/Intern on/off site  *Evidence: Supervisor’s report* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| A6 | Employers and Graduates/Interns have progress discussions  *Evidence: Feedback and Coaching forms, Minutes of meetings* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| A7 | Unemployed Graduates/Interns are aware of their rights in terms of the Graduate/Intern allowances  *Evidence: Signed off document* | | | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| Criterion B | | | | | Compliance to the SAKHISISIZWE Programme Requirements | | | | | | | | | | | | | | | | | | | | | | |
| **No.** | | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | | |
| B1 | | | Training schedules and assessment schedules are available to graduates | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B2 | | | Grievance procedures if Graduates/Interns are not satisfied with training | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B3 | | | Breakdown of training offered to Graduates/Interns | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B4 | | | Graduates/Interns file complete:  *Evidence: Contract, Certified copy of Qualification document, certified ID Copy* | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B5 | | | Schedule of learning in the workplace | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B6 | | | File of Induction Material | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B7 | | | Reports of training programme delivered | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B8 | | | Reports of Graduates/Interns that have resigned (if any) | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B9 | | | Report of Graduates/Interns successful placement after participation in GDP programme. | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B10 | | | The employer has a current plan in place for the implementation of the GDP | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B11 | | | Graduates/Interns have development plans | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B12 | | | The Employer has the capacity to accommodate the number of Graduates/Interns in relation to the Criteria and Guidelines and the implementation plan (1:10) | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B13 | | | There is a current active contract between the employer and the SAKHISISIZWE | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| B14 | | | There is a job evaluation management plan | | | | | | | | | | |  | | | | | | |  | | |  | | | | |
| Criterion C | | | | | | Compliance to the Basic Conditions of Employment Act | | | | | | | | | | | | | | | | | | | | | |
| **No.** | | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | |
| C1 | | | There is a valid GDP contract/agreement for each Graduate/Intern | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| C2 | | | Graduates/Interns are not paid less than the minimum allowance | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| C3 | | | Graduates/Interns are paid within seven days of the monies being due | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| C4 | | | Graduates/Interns Agreements are terminated through the relevant procedures as stipulated in the GDP Criteria and Guidelines | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| C5 | | | Graduates/Interns do not work more than 45 hours per week | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| C6 | | | The Employer only makes deductions, agreed to, from the Graduate/Intern allowances and as stated in the Learner contract | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| C7 | | | Graduates/Interns are entitled to 1 week’s paid leave per 4 months worked, whichever is the sooner | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| Criterion D | | | | | | | Compliance to the Labour Relations Act | | | | | | | | | | | | | | | | | | | | |
| **No.** | | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | |
| D1 | | | The Employer has disciplinary procedures in place | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| D2 | | | The Employer has grievance procedures in place | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| D3 | | | The Employer has dispute resolution procedures in place | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| Criterion E | | | | | | | | Compliance to the Employment Equity Act | | | | | | | | | | | | | | | | | | | |
| **No.** | | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | |
| E1 | | | The Employer prohibits unfair discrimination | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| Criterion F | | | | Compliance to the Occupational Health and Safety Act | | | | | | | | | | | | | | | | | | | | | | | |
| **No.** | | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | |
| F1 | | | The employer has health and safety policies and procedures in place | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| F2 | | | Graduates/Interns are aware of the workplace health and safety policies and procedures | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| Criterion G | | | | | | | | | Compliance to the Compensation for Occupational Injuries and Diseases Act | | | | | | | | | | | | | | | | | | |
| **No.** | | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | **Compliant YES or NO** | | | **Action required** | | | |
| G1 | | | The employer has registered with the commissioner of the compensation fund | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| G2 | | | Graduates/Interns are aware of the policies and procedures to follow in the event of an accident or injury when on duty | | | | | | | | | | |  | | | | | | |  | | |  | | | |
| Criterion H | | | | Compliance to the ETQA Requirements | | | | | | | | | | | | | | | | | | | | | | | |
| **No.** | | **Conforming Requirement** | | | | | | | | | | | **Evidence Submitted** | | | | | | | | **Compliance**  **(Tick One)** | | | | | **Action Required** | |
| **Yes** | | **No** | | |  | |
|  | | **Roles and responsibilities** | | | | | | | | | | | | | | | | | | |  | |  | | |  | |
| H1 | | The roles and responsibilities of both the provider and employers are clearly documented. | | | | | | | | |  | | | | | | | | | |  | |  | | |  | |
| H2 | | The workplace assessors, coaches, mentors who are involved on the implementation of a Learnership are appropriately. | | | | | | | | |  | | | | | | | | | |  | |  | | |  | |
| H3 | | Indicate the learning programme/s being completed by learners and indicate whether the provider has approval to offer it | | | | | | | | |  | | | | | | | | | |  | |  | | |  | |
|  | | **Administration systems related to assessment and moderation practices** | | | | | | | | | | | | | | | | | | |  | |  | | |  | |
| H4 | | The application of skills in the workplace is an integral part of ETD programmes. | | | | | | | | | | | | | |  | | | | |  | |  | | |  | |
| H5 | | Assessors briefed the candidates on how the assessment would be conducted and the evidence that was required? | | | | | | | | | | | | | |  | | | | |  | |  | | |  | |
| H6 | | Facilitators and assessors provided learner/candidates with accurate advice and support to enable them to meet the requirements. | | | | | | | | | | | | | |  | | | | |  | |  | | |  | |
| FINAL JUDGEMENTS | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | | | | | **YES/NO** | **COMMENTS ON FINDINGS** | | | | | | | | | |
| **Has the purpose of the monitoring visit been met** | | | | | | | | | | | | | | | | |  |  | | | | | | | | | |
| **A follow up monitoring visit is required** | | | | | | | | | | | | | | | | |  |  | | | | | | | | | |
| **GENERAL MONITORING RATING** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Section A** | | | | | | | | | |  | | **Section D** | | | | | | | |  | |  | | | | |  |
| **Section B** | | | | | | | | | |  | | **Section E** | | | | | | | |  | | **Section H** | | | | |  |
| **Section C** | | | | | | | | | |  | | **Section F** | | | | | | | |  | |  | | | | |  |
| **Company Representative:** | | | | | | | | | | | | | | | **Designation:** | | | | **Signature:** | | | | | | **DATE:** | | |
| **SAKHISISIZWE Representative:** | | | | | | | | | | | | | | | **Designation:** | | | | **Signature:** | | | | | | **DATE:** | | |

RECOMMENDATIONS

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WORKPLACE ASSIGNMENT logbook

mANAGEMENT LEVEL 4 **SAQA 57712**

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| CONTACT ADDRESS |  |
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| Code |  |
| Telephone (H) |  |
| Telephone (W) |  |
| Cellular |  |
| Learner Number |  |
| Identity Number |  |
| EMPLOYER |  |
| EMPLOYER CONTACT ADDRESS |  |
|  |
| Supervisor Name |  |
| Supervisor Contact Address |  |
|  |
| Telephone (H) |  |
| Telephone (W) |  |
| Cellular |  |

**Introduction to the Practical Workplace Logbook**

Congratulations completing the program. As part of your training you are required to keep a logbook of all practical on the job training and exposure you receive during the learning process.

You will now be assigned to a mentor who will oversee your off-site training, usually referred to as on-the-job training.

The mentor will assist and advise you on the practical aspects of the job, how to fit into the company, what is expected of you as an employee and as a future supervisor.

This Practical Workplace Logbook must be used as a guide to enable learners to achieve the specific outcomes, including the critical cross-field outcomes of the unit standard for this Learning Programme.

The purpose of the Logbook is to indicate to learners and their workplace coaches / mentors / assessors the practical skills to be developed and to be demonstrated by them in the workplace in order for them to meet the requirements of the specific outcomes and critical cross-field outcomes listed in the unit standard.

Learners must be able to prove their competence at the prescribed skills by being given the opportunity to participate in and perform the tasks / responsibilities that will expose them to the specific outcomes and critical cross-field outcomes and associated skills.

Workplace coaches / mentors / assessors must assess competence in the workplace by looking for evidence in a learner to perform the different tasks in a manner that meets the requirements of the unit standard.

Workplace coaches / mentors / assessor must also ensure that the workplace:

Is conducive to fair and objective assessments

Enables the learner to apply and demonstrate skill and knowledge

Allows the learners to feel comfortable to learn and to be assessed

Is supportive of the learning interventions

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| **Organisation Name** |  | | |
| **Programme Coordinator** |  | | |
| **Coordinator Contact Details** |  | | |
| **Training Provider** | SAKHISISIZWE | | |
| **Provider Role:**   * Manage delivery * Manage assessment * Manage full provision |  | | |
| **Programme Nature and Name**   * Qualification * Learnership * Learning Programme * Skills Programme | MANAGEMENT LEVEL 4 57712 | | |
| **Programme Duration (Notional Hours)** |  | | |
| **Workplace Component (Notional Hours)** |  | | |
| Criteria | | Met | Not Yet Met |
| The learner is familiar with all required workplace exposure for this learning programme, and has access to the logbook requirements | |  |  |
| The employer / organisation is familiar with all required workplace exposure for this learning programme and has access to the logbook requirements | |  |  |
| All required assessment instruments and resources are available in advance to the employer to carry out workplace assessments | |  |  |

Responsibilities

**Responsibilities of the learner**

Include: One hundred percent commitment to the learning process. Learners are encouraged to study any additional source of information relevant to this learning process. -Doing all assignments contained in this logbook as well any tasks and assignments received from your mentor or supervisor to whom you have been assigned.

Although the mentor is responsible to sign off all sections completed, it is the learner’s responsibility to ensure that all paperwork is completed and handed in for filing on his/her record of learning. It should be clearly stated to learners that a 100% complete record of learning, as prescribed by this logbook, is their sole responsibility. Any document missing from the record may result in your not being declared competent. -Discuss any problems that you may have with your mentor.

**Responsibilities of the Mentor**

Congratulations on your appointment as a mentor to the learner. This is a very responsible assignment because you have been tasked with the responsibility of rounding off the learner’s practical exposure.

You must ensure that you are familiar with all aspects of the work covered in this logbook because you must keep a daily account of the learner’s performance.

You are also required to report to the skills development facilitator, or as agreed between yourself, the coordinator and the learner regarding the learner’s progress. Your responsibilities as mentor are as follows:

Study the logbook and acquaint yourself with its content and format

Remember this logbook is the learner’s full record of learning and workplace exposure. All activities which the learner participates in must be recorded, and all documents produced in relation to this learnership must form part of the record of learning

Get all the learners together and explain its purpose to them and also what is required of them

Remember the mentor is the creator of learning and exposure opportunities. You should therefore not confine the learner’s exposure to this logbook alone

Continuously guide them in doing the assignments and arranging the planned exposure with the relevant departments

File all duplicate records of learning on a file for each learner

Send all original records to the training provider at the end of end of each month. The Seta also requires that copies be held at the companies

This logbook need not be followed chronologically, but please note that the learner is required to work through the entire logbook by the end of the learning period

**Responsibilities of the Employer**

Creating an atmosphere conducive to learning -Giving learners ample access to the working environment. Remember that learners should be productive employees to get practical exposure to all aspects of the transport operation as required by the learnership. Ensure that learners, mentors and assessors attend all training required and arrange and pay travelling and, accommodation, costs. Ensure availability of sufficient mentors and workplace assessors.

**Workplace Project 242820 (as can be found in your LG and LAG)**

**1. Organisational documents**

1.1 Include **three completed organisational documents** (reports, data sheets, memos, etc.) that you have to submit to management in the course of your duties.

1.2 They must all be different types and must be **signed by the recipient(s)/ your coach.**

1.3 Write a short paragraph of 3-5 lines on each document, describing the **purpose** of each and **where it ultimately ends up**.

1.4 Explain how you ensure that documents and records in your care are safely stored. **What storage method do you use and how safe is it?**

**2. Individual records**

2.1 Include **2 copies of actual employee records:**

2.1.1 One must be a **record of a meeting** with an employee about his/her performance (This can range from a formal performance appraisal to an informal discussion where you praise or reprimand an employee, e.g. you can submit a signed and dated transcript of the “sandwich” you gave him/ her)

2.1.2 One must be a **record of attendance** (e.g. time sheet, leave application, etc.) 2.2 Select one piece of information from each and explain why it is important that you, as the team leader, have access to that specific information.

2.3 Give examples of what would constitute misuse of that information by either you or the company.

**3. Disciplinary records**

3.1 Include a copy of a **record of a disciplinary meeting** you either chaired or attended. (3.2 Based on the evidence presented at this meeting, express an opinion (in a paragraph of 3-5 lines) as to **what corrective action should be taken**.

**4. Control**

4.1 Include copies of the following records for a period of **one month** (1 copy of each is sufficient):

4.1.1 Budget sheets

4.1.2 Order forms/ requisitions

4.1.3 Stock control

4.2 Write a paragraph of 5-10 lines OR draw up a table, explaining how each of these documents is important when it comes to **controlling a team’s costs and cost-cutting in a team (See US 13918)**

**5. Records of accidents, injuries and other incidents:**

5.1 Include **a copy** of **either** an accident, or an injury, or an incident report.

5.2 Write a short explanation (3-5 lines) of **why** records of accidents, injuries and other incidents must be kept by a company.

5.3 Explain the **consequences** if the company did not comply with these requirements.

5.4 Give an example from your own or a colleague’s experience where a record was **not kept** according to the requirements. What was missing from the records and what was the outcome of the matter? What lesson can one learn from this incident?

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| **Logbook Unit Standard Title: 242820**  **Identify and keep records that a team manager is responsible for keeping** | | | | | | | |  |
| **Date** | | **Assignment No** | | **Start** | | **Finish** | **Total Hours** | **MENTOR SIGNATURE** |
| *e.g.*  *12/9/2014* | | *1* | | *10:00* | | *14:00* | *4* |  |
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| **Logbook 242816** | | | | | | | |  |
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**Workplace Research Assessment 242810**

You have to develop a budget for your section or department.

1. Develop a budget template to use
2. Find out what expenses your section/department has
3. Do research about the monthly amounts of these expense items
4. Based on your research, do a zero-based budget for the expenses of your department for the next 6 months
5. Use the figures from the zero-based budget and develop a budget for the following 6 months. Increase the amounts of the expenses between 2% and 8%, but electricity should increase by 25%
6. What resources will your department need in order to achieve your objectives for the next 12 months?
7. Find out what the costs of these resources will be and add them to the budgets as described below
8. Monitor the actual expenses for your department against your budget for at least three months
9. Identify variances and suggest corrective measures that correspond to the SOP of your organisation
10. Show your work to your supervisor and request him/her to allow you to develop the actual budget for your department for the next budget period
11. What internal and external constraints exist on the budget of your department?
12. Explain how variances are identified and reported in your organisation
13. Attach copies of all the above documentation to your assessment

**Reflection questions**

1. Reflect on the Standard Operating Procedures of your organisation as they refer to budgeting. What improvements could you suggest? Think of report layouts, timing of reports, contents of reports, etc.
2. Reflect on what you now know about budgets. How will this knowledge help you in your job and your personal life? Think about balancing your own budget, cutting costs at work, and so on.

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| **Logbook 242810** | | | | |  |
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**Workplace Research Assessment**

You have to produce a task list for your team at work.

1. Prioritise the task list and explain why this is the best order for the tasks in terms of organisational and personal goals and values
2. Record any information and documentation that will be needed
3. Flag these for further attention
4. Record resources that have to be used to accomplish these tasks
5. Identify any resources that have to be acquired to accomplish the tasks on the task list
6. Assign the tasks to the team members. Provide proof of this in the form of a task sheet signed by the team member or minutes of meeting that show that the tasks have been assigned.
7. Inform all relevant stakeholders of tasks that affect them. Attach proof of this
8. Amend the task list where necessary and add tasks where needed. Attach proof
9. Indicate completed tasks on the task list
10. Report completed tasks to management in the format required by your organisation
11. Monitor the work of team members to ensure that the tasks are completed on time. Attach proof in the form of minutes of meetings or schedules that you use to monitor work
12. Record the information of the task list in the diary used by your team
13. When a task is due for action, make sure that you or the team member responsible take the required action. You have to provide proof in the form of a completed task signed off by your supervisor, or minutes of meetings that indicate that a task has been completed. Any other form of proof that is signed by your supervisor is also acceptable

**Reflection questions**

1. Think about the time management training that you have attended. Now that you know how to prioritise your work and the work of your unit/team/section, how will this help you to get more done in a day?
2. How will a task list help you to use your resources more effectively?
3. How did you benefit from this learning programme? List as many benefits as possible

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## *Workplace Research Assessment 242815*

1. Describe the components of the 'moral compass' and identify the positions of your team members on the moral compass
2. Describe your organisation’s code of conduct as it relates to documents
3. Compare your organisation’s code of conduct with the Constitution and the moral compass
4. Observe your work team and describe what potential conflict exists between the personal value systems of the team members and the code of conduct of your organisation. You may use examples of events that have already happened in the organisation
5. Give two examples of consequences where the code of conduct is not adhered to
6. Why is it important that you should report deviations in areas beyond your area of responsibility?
7. Explain what aspects of the code of conduct are applied on a day-to-day basis in your team and how these aspects are upheld. Refer to the SOP of your organisation in your explanation.

**Reflection questions**

1. Reflect on the concept of a code of conduct and how it should influence people’s behaviour in a positive way. How did this training change your view about what is right and wrong?
2. What suggestions can you make to improve the code of conduct and adherence to the code of conduct in your organisation?
3. Think about unethical conduct in real life, e.g. a sport star who takes bribes and then makes sure that the team loses the game or a music star who drives while drunk and then causes an accident in which people die. Quote your own example of unethical conduct by a well-known person and explain what you think should happen to this person.

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**Workplace Research Project 242812**

**Work sample: prepare to induct a new member**

You have to prepare to receive a new member into your team

1. Make a list of the documents the new employee will need to complete, according to the standard operating procedures of the organisation.
2. List the resources the new employee will need, according to the standard operating procedures of the organisation.
3. Where will the employee work? Identify a workstation for the new employee.
4. Attach all relevant documents
5. Prepare to welcome and introduce the new employee to the team. Once you feel you have prepared sufficiently, make an appointment with your facilitator to demonstrate the induction process.

**Work sample: plot your own career path**

***Reflection questions***

* Investigate advancement and career building opportunities in your organisation. Reflect on your career prospects and opportunities and do the following:
* Plot a career path for yourself
* Determine the knowledge and skills you need to advance to the next level
* Find out what opportunities exist in your organisation to acquire this knowledge and skills
* Find out what outside opportunities for learning exist in your industry and your chosen career path
* Develop a training program for yourself
* Discuss your prospects with your supervisor/manager
* Attach copies of all the above documents to your assessment
* Attach copies of minutes of the meeting with your supervisor

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**Workplace Research Assessment**

This workplace assignment has to be done over a period of a couple of weeks. You will have to attach proof of your activities in the form of: action plans, minutes of meetings, copies of your job description, task lists, et

You have to identify the responsibilities of a team leader in your organisation.

1. Explain your role in the organisation is explained with reference to your job description
2. Explain your responsibilities as a team leader
3. Explain the concepts of authority, responsibility and accountability with reference to your own position in an organisation
4. Explain how you have organised your team members in a team that is capable of meeting the objectives of the organisation
5. What is the purpose of your team? Explain this to the team members during a meeting
6. During the same meeting, identify the role and expected outputs of each member of the team in relation to the purpose of the team
7. Discuss tasks, performance plans, targets and standards and agreed this with the team members
8. Agree and allocate time lines for achieving individual and team objectives through a process of consultation, which must be proved by some form of documentation, e.g. minutes of meetings
9. Implement these plans of action according to Standard Operating Procedures
10. Together with the team, reflect on potential difficulties in achieving the plan
11. Monitor team outputs against the agreed targets and time allocations
12. Identify variances to required outputs and take corrective action where necessary
13. Think about how important your job is for your team/unit/section. How do you feel now that you know that your job is important?
14. What would happen if you did not do your job correctly?
15. How did this training change the way you approach working in a team?

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**Workplace Research Assessment**

This assessment activity has to take place in the workplace regarding a real problem. It will therefore take a couple of weeks to complete.

You have to identify a problem in the workplace and then take the following steps to solve the problem, make decisions and implement solutions:

Define the problem

Investigate the problem

Generate problem solutions

Implement solution

Evaluate the effectiveness of the solution

You will have to provide proof of your actions in the form of minutes of meetings, notes made during problem-solving sessions and any other documentation that will verify your actions.

Do the following:

1. Define the problem according to the verified information. Information must include at least: facts and opinions (positive or negative), future implications of no action, and emotions
2. Explain the rationale for consulting with stakeholders and role-players to ensure that they contribute to the various stages of the problem-solving process
3. Explore and explain techniques in the formulation of the problem definition
4. Select a technique in line with the context of the problem
5. Investigate a problem to ascertain the various components
6. Obtain further information and examine all information for its relevance to the problem
7. Generate possible solutions by using a range of problem-solving techniques. These techniques must include at least: Delphi Technique, Mapping, Computer Modelling, Observation, Questionnaires, Experiments, Brainstorming
8. Identify and weigh criteria and then proposed solutions. Criteria must include: feasibility, time, cost, resource implications, stakeholder commitment, and logistics
9. Evaluate possible solutions against the established criteria in order to determine suitability
10. Select the optimum solution(s) selected in accordance with given criteria
11. Consult with stakeholders prior to implementation, so as to obtain commitment
12. Implement the selected solution (s) according to organisational constraints
13. Identify criteria for the measurement of the effectiveness of the solution according to the problem definition. Criteria must include: feasibility, suitability, acceptance, return on investment and alignment to role or strategy
14. Evaluate the effectiveness of the solution against the criteria
15. Identify and apply corrective action

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**Workplace Research Assessment**

1. Describe the supply chain of your organisation. This supply chain must include: internal and external suppliers and customers, contractors, service providers, consultants and members of the sales team.
2. Draw a diagram to show how the different departments in your organisation depend on each other.
3. Based on your description and diagram, identify the internal and external customers of your department or section.
4. Explain at least two key performance areas for your team regarding customer service.
5. Why is it important for your department/section and the organisation as a whole to achieve and maintain high levels of customer service? Base your explanation on the consequences of poor service on the objectives of your department/section and the organisation as a whole
6. Do an internal and external customer service audit based on the key performance areas of your department/section.
7. The questions should enable you to measure the performance of your department/section against the standards expected by your organisation.
8. Record and analyse the results of the audit

**Reflection questions**

Reflect about the results of your customer service audit and answer the following questions:

1. Give feedback about the performance of your department/section to the members of your team. Follow standard operating procedures when giving feedback, i.e. a report or a meeting, etc.
2. Identify corrective action that can be taken to improve customer service and make recommendations to management.
3. Attach documentary evidence of your actions to the assessment in the form of copies of reports, minutes of meetings, questionnaires used, quotes from SOP, etc.

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**Workplace activities**

**Research and Presentation Assessment**

**Assessment Activity 2.1**

Prepare a presentation that covers the following topics:

Outline the relationship between human behaviour and HIV/AIDS

Explain why certain behaviours and activities carry a low risk of infection

Explain how STD’s can increase the risk of HIV/AIDS

List and discuss the possible problems that a worker with HIV/AIDS could encounter in the workplace.

Why should employers play a proactive role in addressing the AIDS pandemic?

What HIV/AIDS prevention and wellness programmes are provided by medical schemes and other organisations?

Create a table listing the treatment options available to a person with HIV/AIDS in South Africa.

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What are the rights of workers? List at least three

Explain the needs of AIDS orphans

What would be the result of the burden of a large number of orphans on society and the economy

What effect would a population composed mainly of children and the aged have on the economy and the State

People with HIV/AIDS have need for medical care. What would the effect of this be on employers and the state?

What effect does HIV/AIDS have on family income?

What effect does HIV/AIDS have on the workforce?

What effect does HIV/AIDS have on the transport industry?

**Assessment Activity 2.2**

During exercise 4 you were requested to draft a workplace policy for HIV/AIDS.

Attach the policy to your assessment.

What would you include in a code of behaviour for the workplace?

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**Workplace Research Project**

1. Identify the overall strategy of your organisation. You can do this by discussing the subject with your supervisor or departmental manager, or you can look for documents that contain the overall strategy of the organisation.
2. Once you have identified the overall strategy, explain the vision and mission of your organisation
3. Also state the key success factors that apply to your organisation
4. You must also explain the long-term strategy as well as the business strategy of your organisation
5. Discuss at least two advantages and disadvantages of having an overall strategy as they apply to your organisation
6. Identify and explain, using examples, the elements of the overall strategy that apply to your area of responsibility
7. Attach minutes of meetings held with your supervisor or manager
8. Identify and explain the objectives and activities of your own area of responsibility as they are explained in the standard operating procedures.
9. Explain the goals, performance outcomes, outputs, KPOs and KPAs for your own area of responsibility
10. Hold ameeting with your team members to explain the role of the team in terms of the overall strategy of the organisation
11. Encourage participation of the team members so that they can provide feedback about their views on the role of the team
12. Attach minutes of meetings held with team members regarding the role of the team, goals, performance outcomes, outputs, key performance objectives and key performance areas. Make sure that the minutes reflect feedback from team members.

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**Workplace Assignments**

**Workplace Project**

1. Develop an organisation structure for your own organisation.
2. Explain how the division of tasks has been done
3. Explain how middle- and first-line managers interact with each other in your organisation, by referring to these specific topics: human resources, finance, marketing, public relations, funding and production. For example, who is responsible for the overall human resources function and what are the responsibilities of how do middle and first line management regarding human resources?

**Reflection questions**

1. Reflect on the structure of your organisation and discuss at least one advantage and disadvantage of the structure
2. Describe your responsibilities as a first line manager
3. How do your responsibilities as a first line manager interact with other first line managers?
4. How do your responsibilities as a first line manager interact with middle managers?

**Research Project**

If necessary, do research to complete this project.

1. Draw organograms to illustrate the following organisation structures: functional, matrix, divisional and hierarchical (line).
2. Discuss the advantage and disadvantages of each type of structure.
3. Develop an organisation structure for a small business
4. Explain why the structure for a small and a larger organisation is different.

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**Management 4 Rollout Plan**

**Module One: Planning: Develop plans to achieve defined objectives**

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|  | **Exit Level Outcomes** | **Assessment Criteria** | **Unit Standard code** | **Unit Standard title** | **Unit Standard level** | **credits** | **type** |
| **Planning** | 1. Develop plans to achieve defined objectives. | Information is analysed and presented according to organisational objectives and requirements. | *242820* | *Maintain records for a team* | *NQF Level*  *03* | *4* | *Elective* |
| A plan is developed by using a systematic process. | 242822 | Employ a systematic approach to achieving objectives | NQF Level  04 | 10 | Core |
| Tasks, resources, timeframes and measurement criteria are defined and aligned to meet organisational objectives. | 242816 | Conduct a structured meeting | NQF Level  04 | 5 | Core |

Module Two: Organising: Organise resources in accordance with developed plan.

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|  | **Exit Level Outcomes** | **Assessment Criteria** | **Unit Standard code** | **Unit Standard title** | **NQF level** | **Credits** | **Type** |
| Organising | 2. Organise resources in accordance with developed plan. | Methods, procedures and techniques to organise a work unit are applied in accordance with organisational requirements. | [242815](http://regqs.saqa.org.za/showUnitStandard.php?id=242815) | Apply the organisation's code of conduct in a work environment | NQF Level  04 | 5 | Core |
| The activities of the work unit are analysed and adjusted in order to align to the organisational strategies. | [242810](http://regqs.saqa.org.za/showUnitStandard.php?id=242810) | Manage Expenditure against a budget | NQF Level  04 | 6 | Core |
| Resources are allocated to achieve the developed plan. | [242811](http://regqs.saqa.org.za/showUnitStandard.php?id=242811) | Prioritise time and work for self and team | NQF Level  04 | 5 | Core |

Module Three Team Leading: Lead a team to work co-operatively to achieve objectives.

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|  | **Exit Level Outcomes** | **Assessment Criteria** | **Unit Standard code** | **Unit Standard title** | **Unit Standard level** | **credits** | **type** |
| Leading | 3. Lead a team to work co-operatively to achieve objectives. | The principles of leadership are explained and applied within a work  unit. | [242824](http://regqs.saqa.org.za/showUnitStandard.php?id=242824) | Apply leadership concepts in a work context | NQF Level  04 | 12 | Core |
| The organisation's objectives and Standard Operating Procedures (SOPs) are analysed in order to determine the direction of work units. | [*242812*](http://regqs.saqa.org.za/showUnitStandard.php?id=242812) | *Induct a member into a team* | NQF Level  03 | 4 | Elective |
| Tasks, resources, timeframes and measurement criteria are defined and aligned to meet organisational objectives. | [242821](http://regqs.saqa.org.za/showUnitStandard.php?id=242821) | Identify responsibilities of a team leader in ensuring that organisational standards are met | NQF Level  04 | 6 | Core |
| Knowledge of group dynamics is applied to build a team. | [242819](http://regqs.saqa.org.za/showUnitStandard.php?id=242819) | Motivate and Build a Team | NQF Level  04 | 10 | Core |

Module Four: Controlling : Monitor performance to ensure compliance to a developed plan..

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|  | **Exit Level Outcomes** | **Assessment Criteria** | **Unit Standard code** | **Unit Standard title** | **Unit Standard level** | **credits** | **type** |
| Controlling | 4. Monitor performance to ensure compliance to a developed plan. | Work unit performance is measured against organisational objectives. | [242829](http://regqs.saqa.org.za/showUnitStandard.php?id=242829) | Monitor the level of service to a range of customers | NQF Level  04 | 5 | Core |
| Corrective action is taken in response to performance variances in accordance with Standard Operating Procedures . | [242817](http://regqs.saqa.org.za/showUnitStandard.php?id=242817) | Solve problems, make decisions and implement solutions | NQF Level  04 | 8 | Core |

Module Five: Ethics : Make decisions based on a code of ethics.

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|  | **Exit Level Outcomes** | **Assessment Criteria** | **Unit Standard code** | **Unit Standard title** | **Unit Standard level** | **credits** | **type** |
| Ethics | 5. Make decisions based on a code of ethics. | The concept of ethics is explained in terms of its influence on the activities of a work unit. | [*13915*](http://regqs.saqa.org.za/showUnitStandard.php?id=13915) | *Demonstrate knowledge and understanding of HIV/AIDS in a workplace, and its effects on a business sub-sector, own organisation and a specific workplace* | NQF Level  03 | 4 | Elective |
| *The value of a code of ethics is explained in terms of its impact on decision making.* | [*242813*](http://regqs.saqa.org.za/showUnitStandard.php?id=242813) | *Explain the contribution made by own area of responsibility to the overall organisational strategy* | NQF Level  04 | 5 | Elective |
| *Ethical decisions are made in the workplace.* | [*242818*](http://regqs.saqa.org.za/showUnitStandard.php?id=242818) | *Describe the relationship of junior management to other roles* | NQF Level  04 | 5 | Elective |

Literacy and Numeracy

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| **Type** | **Unit Standard Title** | **Unit Standard Code** | **NQF Level** | **Level** | **Credits** | **Date** |
| **Fundamentals** | **Fundamental Literacy 1st Language** | 119472 | NQF Level  03 | Accommodate audience and context needs in oral/signed communication | 5 |  |
| 119457 | NQF Level  03 | Interpret and use information from texts | 5 |
| 119467 | NQF Level  03 | Use language and communication in occupational learning programmes | 5 |
| 119465 | NQF Level  03 | Write/present/sign texts for a range of communicative contexts | 5 |
| **Type** | **Unit Standard Title** | **Unit Standard Code** | **NQF Level** | **Level** | **Credits** | **Date** |
| **Fundamentals** | Fundamental Literacy 2nd Language | 119462 | NQF Level  04 | Engage in sustained oral/signed communication and evaluate spoken/signed texts | 5 |  |
| 119469 | NQF Level  04 | Read/view, analyse and respond to a variety of texts | 5 |
| 12153 | NQF Level  04 | Use the writing process to compose texts required in the business environment | 5 |
| 119459 | NQF Level  04 | Write/present/sign for a wide range of contexts | 5 |
| **Type** | **Unit Standard Title** | **Unit Standard Code** | **NQF Level** | **Level** | **Credits** | **Date** |
| **Fundamentals** | **Fundamental Numeracy** | 9015 | NQF Level  04 | Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems | 6 |  |
| 9016 | NQF Level  04 | Represent analyse and calculate shape and motion in 2-and 3- dimensional space in different contexts | 4 |
| 7468 | NQF Level  04 | Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues | 6 |

Final workplace monitoring summary of applied skills

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|  | Needs Improvement | Satisfactory | Good | Very Good | Excellent | |
| 1. **Professional Skills** | **1** | **2** | **3** | **4** | **5** | |
| 1. Shows an understanding of the host employer’s policy, purpose and function and conforms to it. |  |  |  |  |  | |
| 1. Demonstrates capacity to contribute positively to host employer’s organization. |  |  |  |  |  | |
|  | Needs Improvement | Satisfactory | Good | Very Good | Excellent | |
| 1. **Organizational Ability** | 1 | 2 | 3 | 4 | 5 | |
| 1. Ability to expect supervision. |  |  |  |  |  | |
| 1. Ability to carry out a variety of tasks simultaneously. |  |  |  |  |  | |
| 1. Ability to handle stress. |  |  |  |  |  | |
| 1. Ability to meet deadlines. |  |  |  |  |  | |
| 1. Ability to prepare and execute a plan |  |  |  |  |  | |
| 1. Ability to plan or follow a budget. |  |  |  |  |  | |
| 1. Ability to follow up a task. |  |  |  |  |  | |
| 1. Office administration ability. |  |  |  |  |  | |
| 1. Ability to make decisions. |  |  |  |  |  | |
| 1. Ability to identify problems and opportunities. |  |  |  |  |  | |
| 1. Ability to analyse and solve a problem. |  |  |  |  |  | |
| 1. Ability to work in a team. |  |  |  |  |  | |
| 1. Ability to take responsibility and to be accountable for a job. |  |  |  |  |  | |
| 1. **Personal Skills** | **1** | **2** | **3** | **4** | **5** | |
| 1. Honesty/Trustworthiness |  |  |  |  |  | |
| 1. Punctuality / Attendance |  |  |  |  |  | |
| 1. Assertiveness (Conveying opinion and information in a mature and determined manner) |  |  |  |  |  | |
| 1. Reliability / Responsibility |  |  |  |  |  | |
| 1. Willingness to get involved in a task or project. |  |  |  |  |  | |
| 1. Relationship with internal customers(staff) |  |  |  |  |  | |
| 1. Relationship with external customers (Clients) |  |  |  |  |  | |
| 1. Learner’s use of creativity or imagination. |  |  |  |  |  | |
| 1. Demonstrates awareness of social, political and economic developments |  |  |  |  |  | |
| 1. Demonstrate awareness of racial and gender sensitivity. |  |  |  |  |  | |
| 1. Display willingness to grow as a professional. |  |  |  |  |  | |
|  | Needs Improvement | Satisfactory | Good | Very Good | Excellent | |
| 1. **Communication Skills** | **1** | **2** | **3** | **4** | **5** | |
| **Verbal Communication** |  |  |  |  |  | |
| 1. Ability to listen and understand verbal communication |  |  |  |  |  | |
| 1. Ability to speak explicitly (clearly) |  |  |  |  |  | |
| 1. Telephone etiquette |  |  |  |  |  | |
| 1. Interpersonal Communication skills |  |  |  |  |  | |
| 1. Public Communication skills |  |  |  |  |  | |
| **Written Communication** |  |  |  |  |  | |
| 1. Ability to understand written communication. |  |  |  |  |  | |
| 1. Ability to express herself / himself in writing. |  |  |  |  |  | |
| 1. **Contact specific outcomes** | 1 | 2 | 3 | 4 | 5 | |
| 1. Maintain records for a team |  |  |  |  |  | |
| 1. Employ a systematic approach to achieving objectives |  |  |  |  |  | |
| 1. Conduct a structured meeting |  |  |  |  |  | |
| 1. Apply the organization’s code of conduct in a work environment |  |  |  |  |  | |
| 1. Manage Expenditure against a budget |  |  |  |  |  | |
| 1. Prioritize time and work for self and team |  |  |  |  |  | |
| 1. Apply leadership concepts in a work context |  |  |  |  |  | |
| 1. Induct a member into a team |  |  |  |  |  | |
| 1. Identify responsibilities of a team leader in ensuring that organizational standards are met |  |  |  |  |  | |
| 1. Motivate and Build a Team |  |  |  |  |  | |
| 1. Monitor the level of service to a range of customers |  |  |  |  |  | |
| 1. Solve problems, make decisions and implement solutions |  |  |  |  |  | |
| 1. Demonstrate knowledge and understanding of HIV/AIDS in a workplace, and its effects on a business sub-sector, own organization and a specific workplace |  |  |  |  |  | |
| 1. Explain the contribution made by own area of responsibility to the overall organizational strategy   Describe the relationship of junior management to other roles |  |  |  |  |  | |
| 1. **Overall Rating** | **1** | **2** | **3** | **4** | **5** | |
| 1. Overall evaluation of candidate during experiential training. |  |  |  |  |  | |
| 1. Potential to function as a junior manager. |  |  |  |  |  | |
| 1. Potential to function as a communication officer. |  |  |  |  |  | |
| Please use the lines below to highlight any challenges, good practice and suggestions to learner and the training provider. | | | | | | |
| Company Stamp | | | | | |
| **Signature of Supervisor and Date:** | | | | | |
| **Signature of Learner and Date:** | | | | | |
| **Signature of Training provider and Date:** | | | | | |

SAMPLE WORKPLACE ATTENDANCE REGISTER TO BE SIGNED DAILY

